



City of San Diego

City of San Diego Park and Recreation Department Golf Division

Torrey Pines Golf Course Review and Recommendations

**Business Plan Update Committee Meeting
November 17, 2011**

Format of Course Review

- Facility Overview
- Review Rounds
- Competitive Analysis
 - Primary Competition
 - Marketing & Advertising
 - Rate Structure
- Facility Review
 - Infrastructure / Course
 - Marketing & Advertising
 - Customer Satisfaction Survey
 - Rate Structure

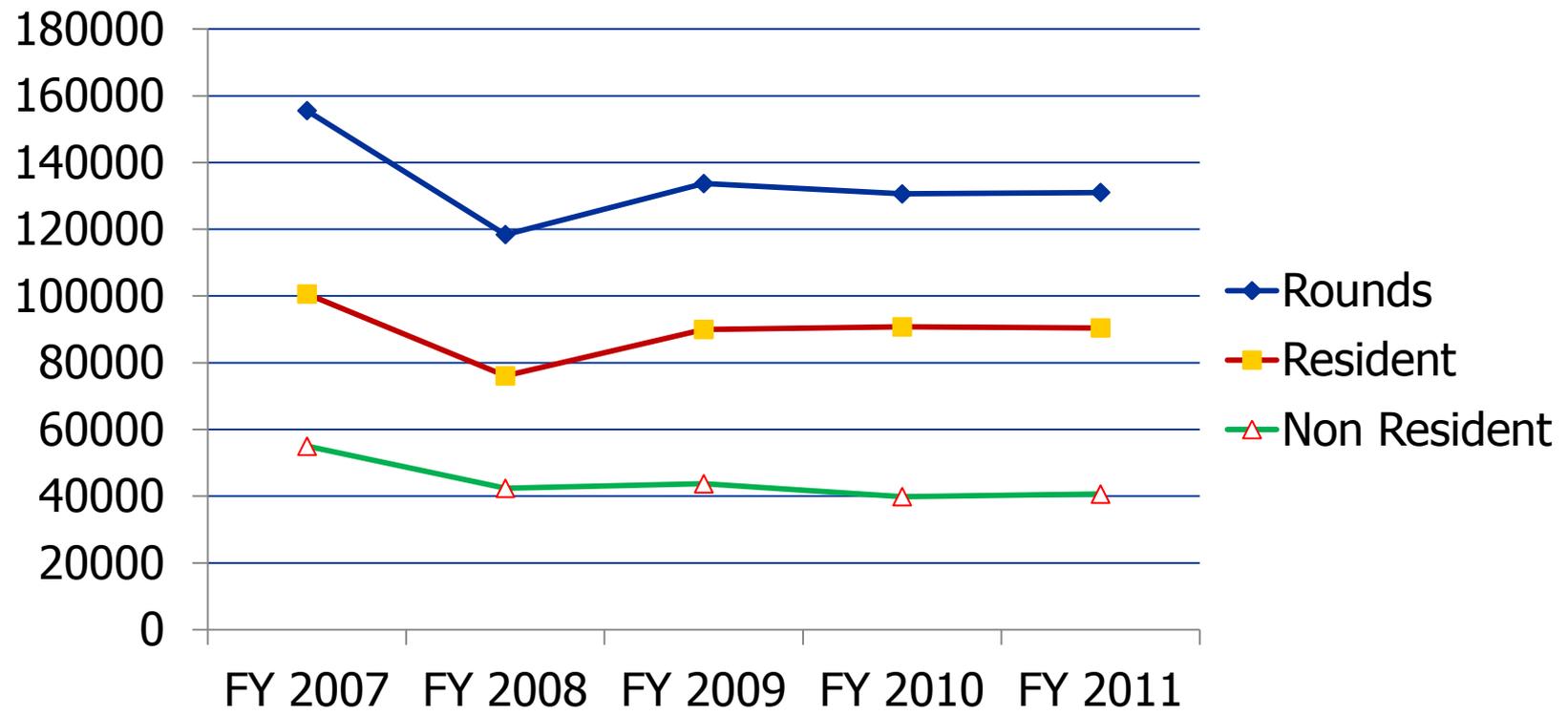








Rounds of Golf – Combined



Footnote: Rounds were down in 2008 due to preparation for the US Open

Competitive Analysis

North Course - Primary Competition

- Arroyo Trabuco Golf Club
Mission Viejo, CA
- Encinitas Ranch Golf Course
Encinitas, CA
- Maderas Golf Club
Poway, CA
- Riverwalk Golf Club
San Diego, CA
- The Crossings at Carlsbad
Carlsbad, CA



Competitive Analysis

South Course – Primary Competition

National

- Bethpage Black Course
Farmington, NY
- Chambers Bay
University Place, WA
- Harding Park Golf Course
San Francisco, CA
- Pebble Beach Golf Links
Pebble Beach, CA

Southern California

- Aviara Golf Club
Carlsbad, CA
- Barona Creek G.C.
Lakeside, CA
- La Costa Resort
Carlsbad, CA
- Pelican Hill G.C.
Newport Beach, CA

Competitive Analysis

Marketing & Advertising

- Preferred Player Clubs
- On-Line Tee Times / Yield Management
- Interactive Websites
- Print Advertising
- Social Networks
- Email Blasts
- Hotel Relationships
- Tournament Sales Staff



Competitive Analysis - Rate Structure

<u>Weekday Prices</u>	Non-Resident		Resident		Non-Resident Senior		Resident Senior		Resident Junior	
	18	9	18	9	18	9	18	9	18	9
	North Course	\$100.00		\$40.00				\$28.00		Monthly Ticket
Arroyo Trabuco	\$80.00		\$70.00				\$65.00		\$30.00	
Encinitas Ranch	\$67.00		\$44.00						\$31.00	
Maderas	\$170.00		\$135.00							
Riverwalk	\$89.00		\$55.00							
The Crossings	\$90.00		\$60.00				\$45.00		\$30.00	

<u>Weekend Prices</u>	Non-Resident		Resident		Non-Resident Senior		Resident Senior		Resident Junior	
	18	9	18	9	18	9	18	9	18	9
	North Course	\$125.00		\$50.00						
Arroyo Trabuco	\$ 100.00		\$90.00				\$85.00		\$50.00	
Encinitas Ranch	\$89.00		\$61.00						\$46.00	
Maderas	\$210.00		\$165.00							
Riverwalk	\$99.00		\$69.00							
The Crossings	\$110.00		\$80.00				\$60.00		\$30.00	

Facility Review

Infrastructure / Course

Torrey Pines Golf Complex

- Strong reputation throughout the golfing world.
- Outstanding location and excellent course conditions.
- Rounds are down 12% from our targeted capacity due to the economy and to artificially restricting play from adhering to the 70% resident / 30% non-resident utilization requirement.
- Tournament facilities are limited.

Facility Review

Infrastructure / Course

North Course

- Outstanding golf experience.
- In the past few years changes have been made to lengthen the golf course.
- The course has constraints and is limited in supporting today's demanding tournament requirements.
- The North Course has the longest yardage for women among the competition.
- On-course restrooms are in need of reconditioning.
- The course is without continuous cart paths.

Facility Review

Infrastructure / Course

South Golf Course

- Internationally recognized as one of the finest municipal courses in the country.
- Prior to the 2008 US Open, significant improvements and upgrades were made to the course.
- The South Course is a long and demanding golf course.
- On-course restrooms are in need of reconditioning.

Facility Review

Infrastructure / Course : Recommendations

Torrey Pines Complex

- Consider re-initiating a discussion regarding a tournament support building.
- Investigate developing unused areas of the facility for non-golf events and activities.
- Discuss market rates for commercial photo and film shoots.
- Establish target rounds for the Business Plan at 146,800; 82,800 for the North Course and 64,000 for the South Course.

Facility Review

Infrastructure / Course : Recommendations

North Course

- Consider constructing continuous cart paths.
- Investigate remodeling the on-course restrooms.
- Evaluate the need for a new set of shorter Women's tees.
- Evaluate the course for general improvements that facilitate hosting competitive tournaments.

Facility Review

Infrastructure / Course : Recommendations

South Course

- Continue to improve course conditioning as well as make improvements that facilitate daily play and hosting major golf events.
- Investigate course set-up options that would increase player enjoyment of the course.
- Investigate remodeling the on-course restrooms.
- Pursue major golf events that would continue to build on and sustain the South Course's local and international reputation.

Facility Review

Marketing & Advertising – Recommendations

To maximize opportunities, we are recommending these ideas.

- Create a marketing staff position
- Utilize our customer database
- Develop an interactive website offering internet tee times
- Proactively solicit tournament play
- Revisit a Southern California rate
- Explore yield management techniques

Facility Review

Customer Satisfaction Survey

The recent survey showed we're doing a number operational issues well:

- Layout of the courses
- Overall condition of the courses
- Availability and condition of practice putting greens
- Condition of the fairways
- Quality of the pro shop

* Data taken from page 23 of the Customer Satisfaction Survey



Facility Review

Customer Satisfaction Survey

There are several areas where we need improvement:

Desired Changes

Residents

- No changes needed
- Reduce fees / cost in general
- Not sure / can't think of anything
- Enforce speed of play
- Improve access to tee time info

* Data taken from page 22 of the Customer Survey

Non-Residents

- No changes needed
- Reduced visitor cost, green fees
- Improve customer service
- Not sure / can't think of anything
- Reduce fees / cost in general

* Data taken from page 22 of the Customer Survey



Facility Review

Customer Satisfaction Survey

There are several areas where we need improvement:

Rating Aspect

Residents

- Availability of tee times when making phone reservations.
- Availability of reservations / walk up
- Pace of Play
- Availability / condition of restrooms
- Availability / condition of driving range facility

* Data taken from page 24 of the Customer Survey

Non-Residents

- Availability / condition of driving range facility
- Value of the course for the fee
- Availability of reservations / walk up
- Availability of tee times when making phone reservations.
- Quality of food & beverage service.

* Data taken from page 24 of the Customer Survey

Facility Review

Customer Satisfaction Survey – Recommendations

- Parking lot / arrival area – Explore adding a bag drop / greeting area.
- Evaluate the training and effectiveness of the marshaling staff and volunteers.
- Review options to re-design the practice facilities.
- Discuss options to expand food & beverage service

Facility Review

Rate Structure

- The staff feels that golf rates in general are in line at this time.
- We are recommending staying with the Resident Golf Card program.
- Consider updating the 70%/30% utilization to a tee time access percentage.
- Discuss releasing un-booked resident tee times.
- Examine the effects of adopting a super-twilight rate for the North course.
- Consider rates for special groups and tournaments.
- Establish rates for non-golf events.
- Discuss rates for Southern California residents.

